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1 Tasks

This feature allows you to create a number of tasks associated with an occurrence. These tasks are then associated with the units for an occurrence. Any number of tasks can be associated with a unit, and a task can be linked to more than one unit.

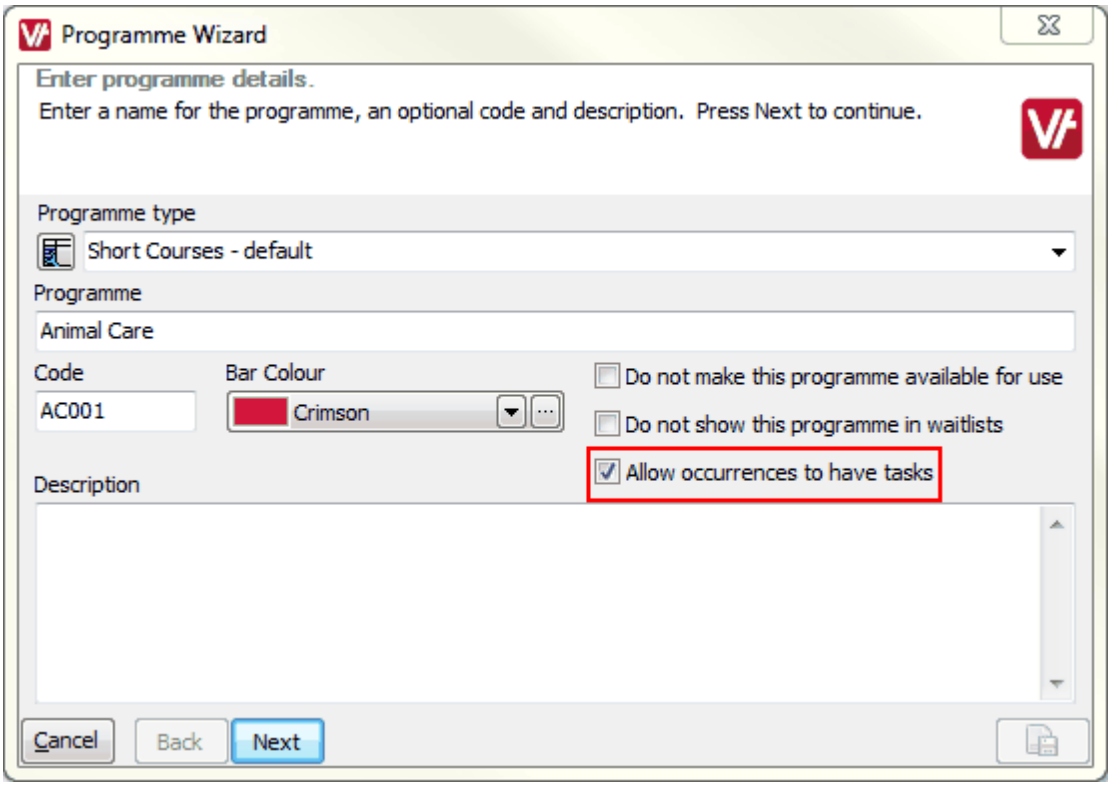
It is then possible to set things up so that a unit can be automatically assigned a result when activity is recorded against tasks(s) associated with it. This is optional, and you can choose what result, if any, should be automatically recorded.

Note that if a task linked to more than one unit is started or completed, a result will be recorded for all units it is linked to, which may differ depending on whether all other tasks for each unit have also been started/completed or not.

1.1 Configuration Manager

Programme Wizard

Indicate in the Programme Wizard if tasks are to be used in occurrences of that programme.



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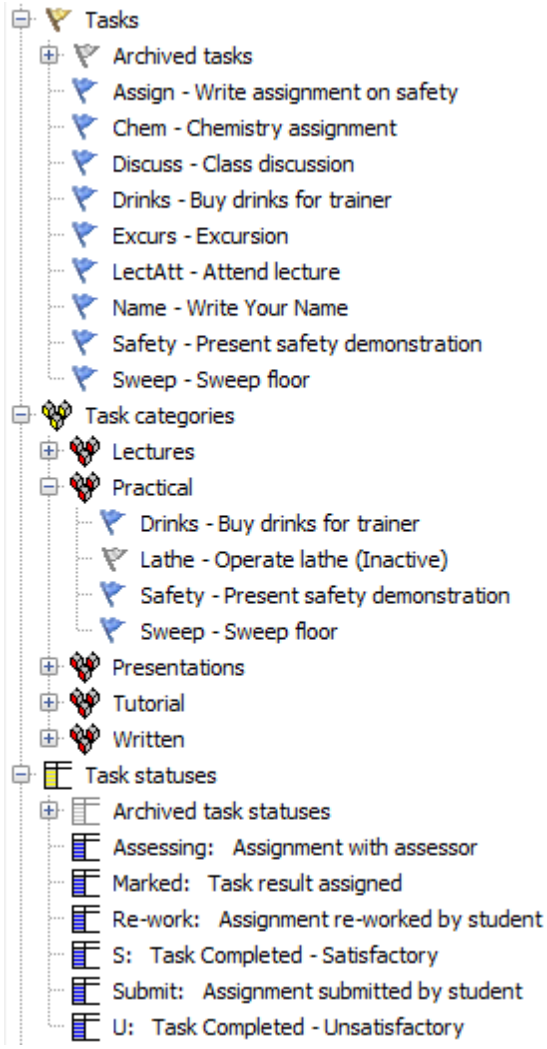
Task Nodes

Three nodes and wizards in the Configuration Manager relate specifically to tasks:

- Tasks / Task Wizard
- Task Categories / Task Category Wizard
- Task Statuses / Task Status Wizard



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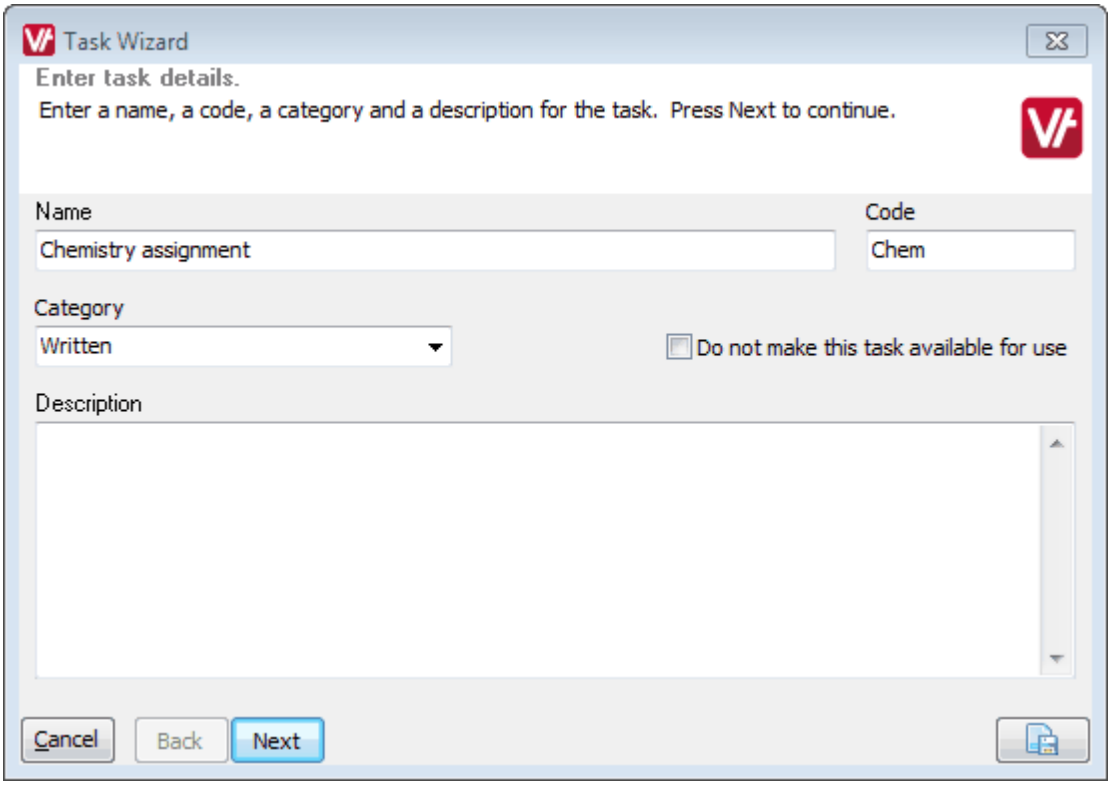

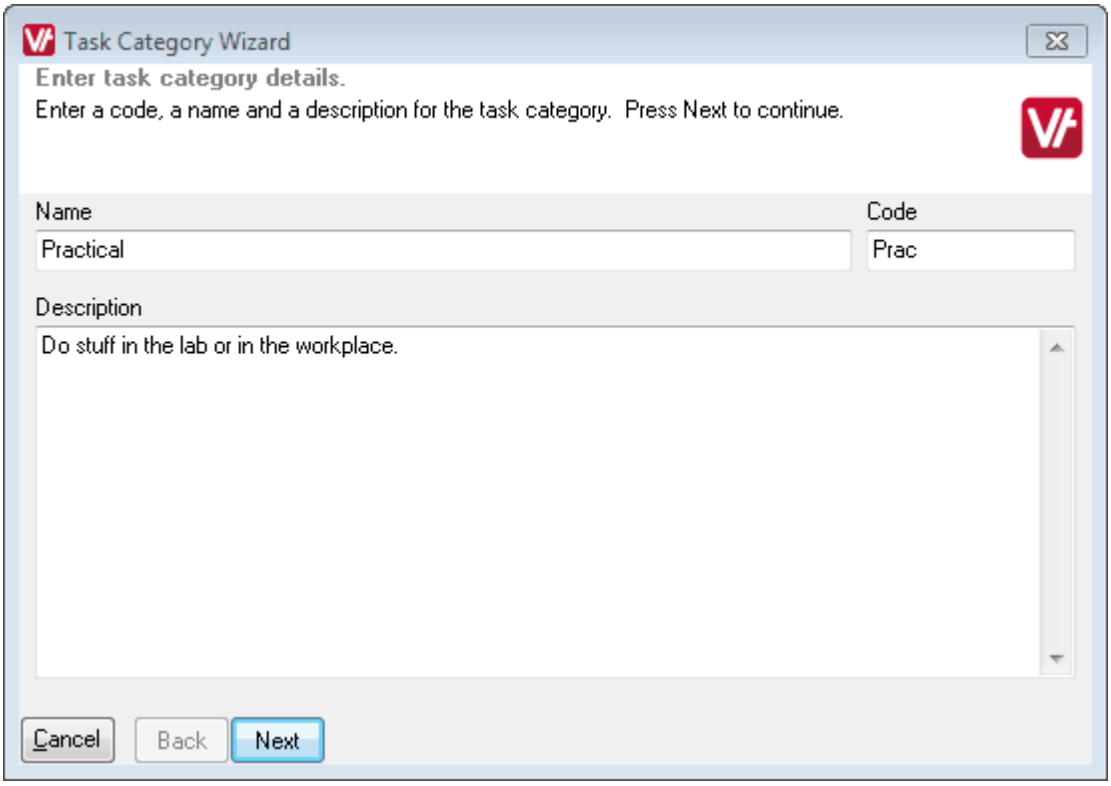

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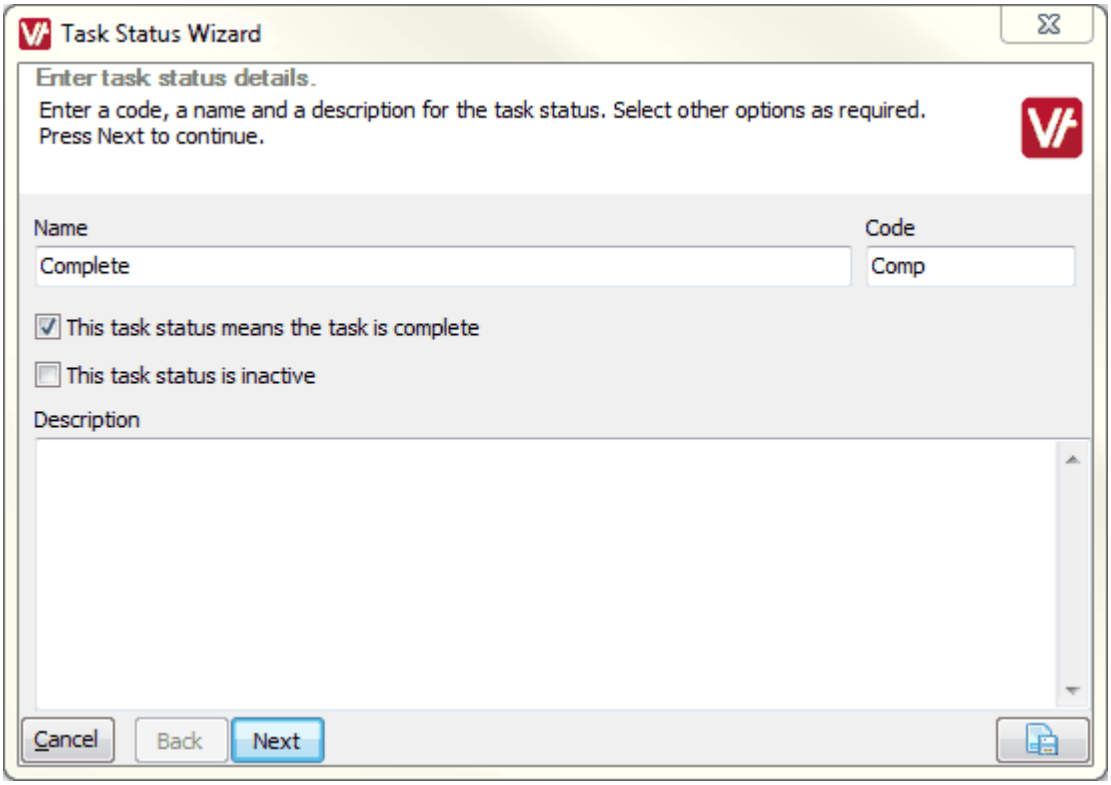

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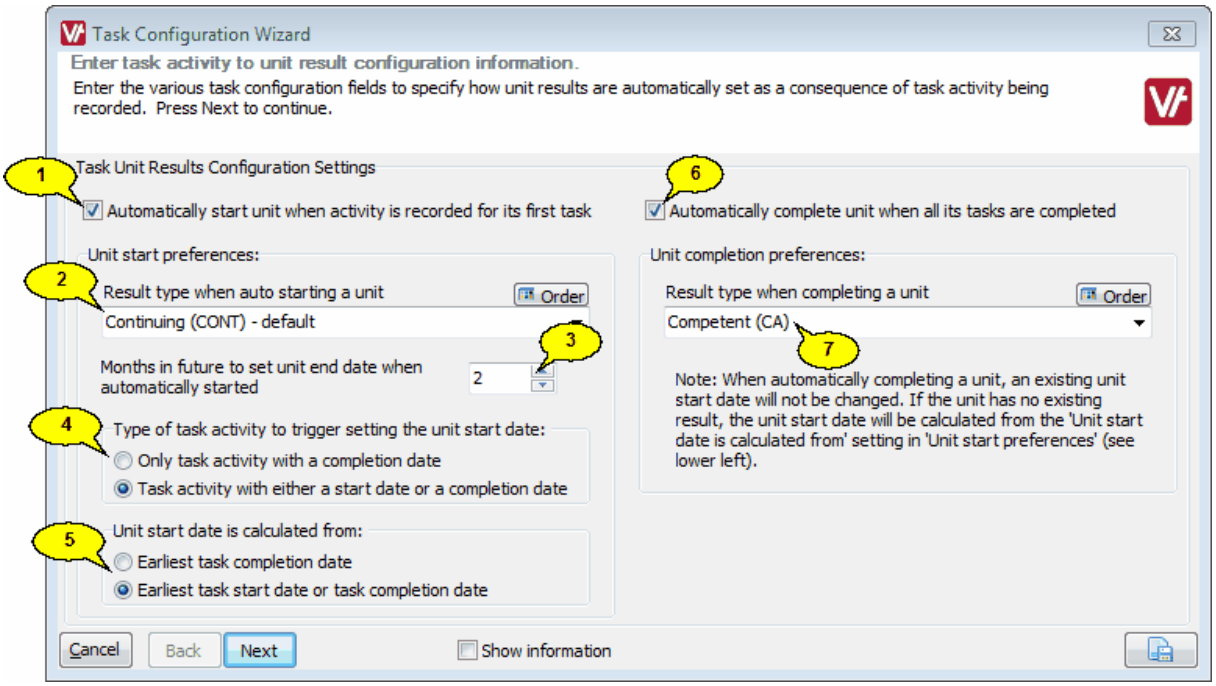
1.2 Task Configuration Wizard

A utility has been added that allows you to set up the rules for automatic resulting of units when activity is recorded for tasks associated with them. This is accessed via ***Utility > Configure task settings***.

There are two scenarios that need to be accounted for - what should happen to a unit when:

- The first task associated with it is started or completed.
- All tasks associated with it are completed.



1. If this box is ticked, a unit will automatically receive the selected result type when activity is recorded for the first task associated with it.
   NOTE: If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.
2. Select the result type to be allocated to a unit when activity is recorded for the first of its tasks. Normally this would be a continuing-type result.
   NOTE: If the unit in question has an existing result, this setting will have no effect - the existing result will NOT be overwritten.
3. The value set here determines what end date is allocated to units that are automatically given a result by the settings above. The end date for the unit will be set to the configured number of months after the latest task start date.
   NOTES:
   - If the end of the enrolment is earlier than the date calculated by this value, the end date of the enrolment will be set instead.
   - However, if the latest task start date is also after the enrolment end date, then the the number of months as set here will be used.
4. If units are to be automatically started when activity is recorded for a task, indicate whether the task activity needs to have a completion date to trigger the start of the unit, or whether commencement of a task is sufficient.
5. If units are to be automatically started or completed when activity is recorded for a task, indicate how the unit start date is to be calculated.
   NOTE: If a unit already has a start date recorded, this will not be overwritten; the existing start date will be used.

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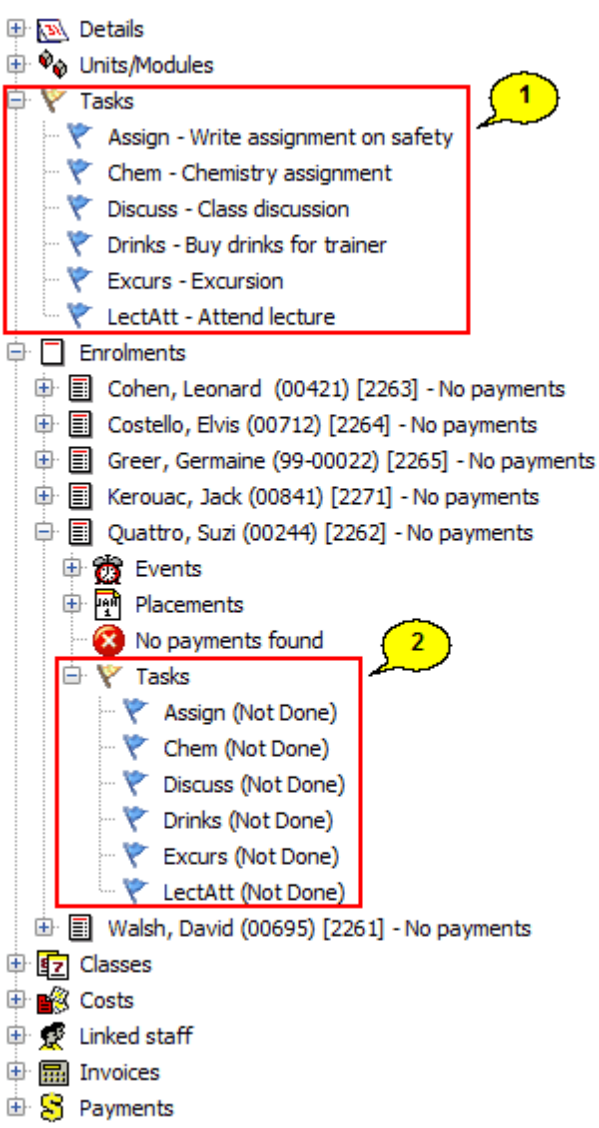
6. If this box is ticked, a unit will automatically receive the selected result type when the person completes all tasks associated with it.
   NOTE: If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.
7. Select the result type to be allocated to a unit when all of its tasks are completed. Normally this would be a completion-type result.
   NOTE: If the unit in question has an existing completed-type result, this setting will have no effect - the existing result will NOT be overwritten.

1.3 Programme Manager

1.3.1 Tasks Nodes

Two new ***Tasks*** nodes have been added:



1. A ***Tasks*** node for the occurrence shows all tasks associated with that occurrence.
2. Another ***Tasks*** node under each individual enrolment shows only the tasks associated with that person's enrolment. This may differ from the list of tasks for the occurrence if the person is not enrolled in all units of the occurrence.

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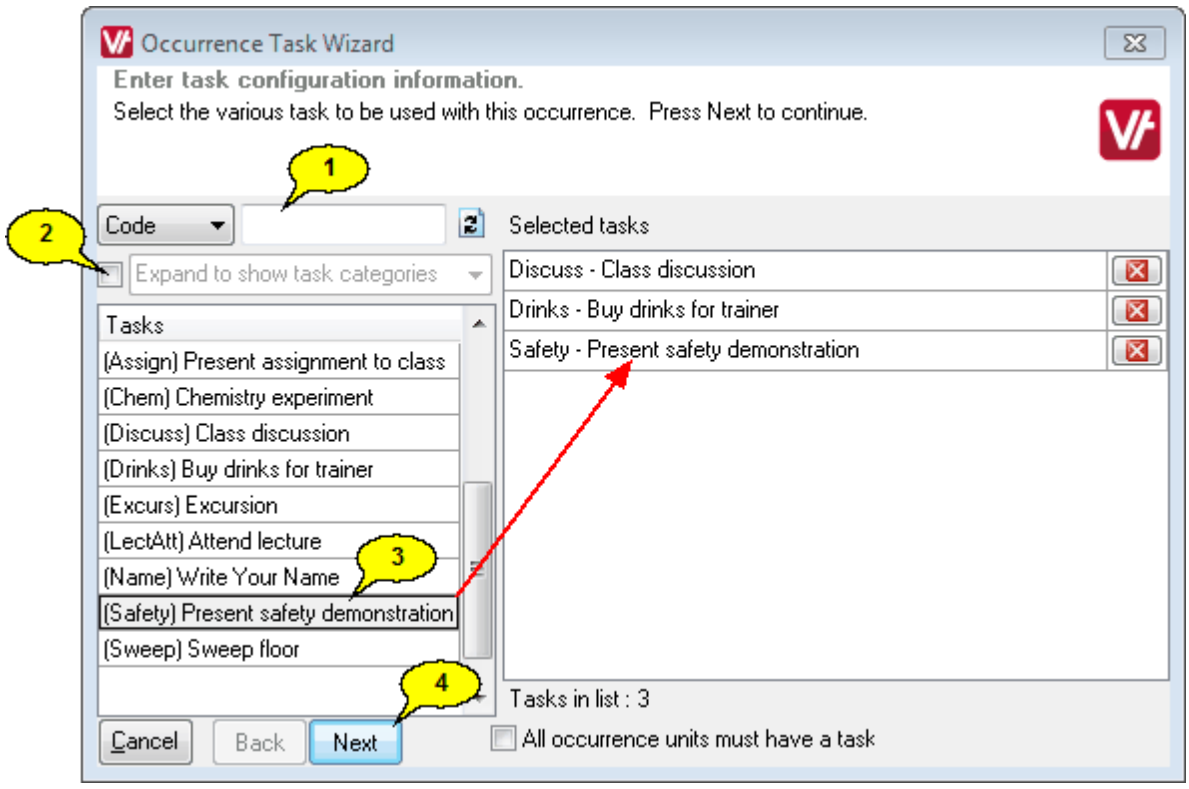
1.3.2 Occurrence Tasks Wizard

A wizard has been added to allow you to select tasks for the occurrence and specify which tasks are linked to which units. To open this wizard, right-click on the ***Tasks*** node for the occurrence and select ***Configure occurrence tasks***.

The first page of the wizard allows you to select tasks for the occurrence, and works in a similar way to the unit selection page of the Occurrence or Enrolment Wizard:



1. Search for the tasks by code or name, or
2. Tick the box to search according to the task category.
3. Double-click on the tasks you want to add to the occurrence, or drag and drop them to the right hand panel.
4. When you have selected all the tasks for the occurrence, click ***Next*** to move on.

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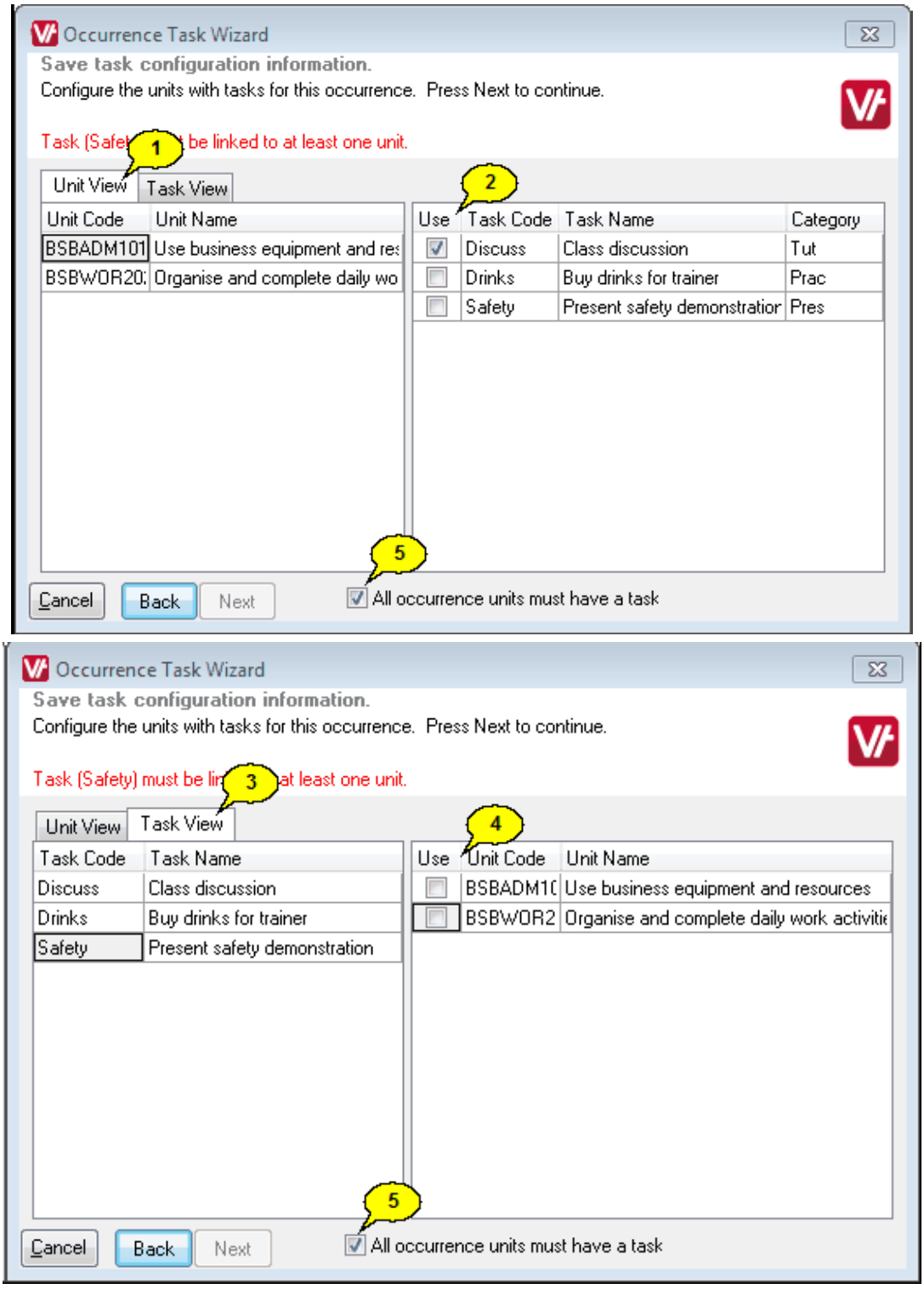
The second page of the wizard allows you to specify which tasks are linked to which units:



1. Click on the ***Unit View*** tab, and
2. Tick the tasks that are to be associated with that unit, or
3. Click on the ***Task View*** tab, and
4. Select the units to associate the task with.
5. By default, all units must be linked to a task. If you want to allow units without tasks, untick this box.

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NOTES:

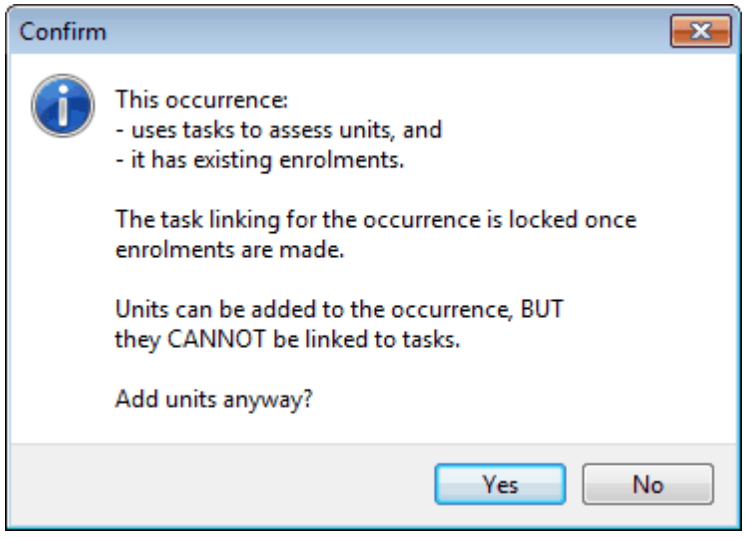
- Although it is possible to have units without tasks linked to them, the reverse is not possible. **All tasks must be associated with at least one unit.**
- Once people are enrolled in the occurrence, it is no longer possible to change the task configuration. The wizard can still be opened in read-only mode. In this case the first page of the wizard will not be shown, and it will be possible only to view the information in the Unit View and Task View tabs; it will not be possible to tick or untick any items.

1.3.3 Occurrence Enrolments

When a person is enrolled into an occurrence, their enrolment automatically receives the tasks and their mappings to units from the occurrence. It is not possible to change the task mappings for individual enrolments.

1.3.4 Adding Units

If an occurrence that uses tasks already has enrolments, it is still possible to add a unit to the occurrence, but it will not be possible to link that unit to any tasks. A warning message to this effect will be displayed:



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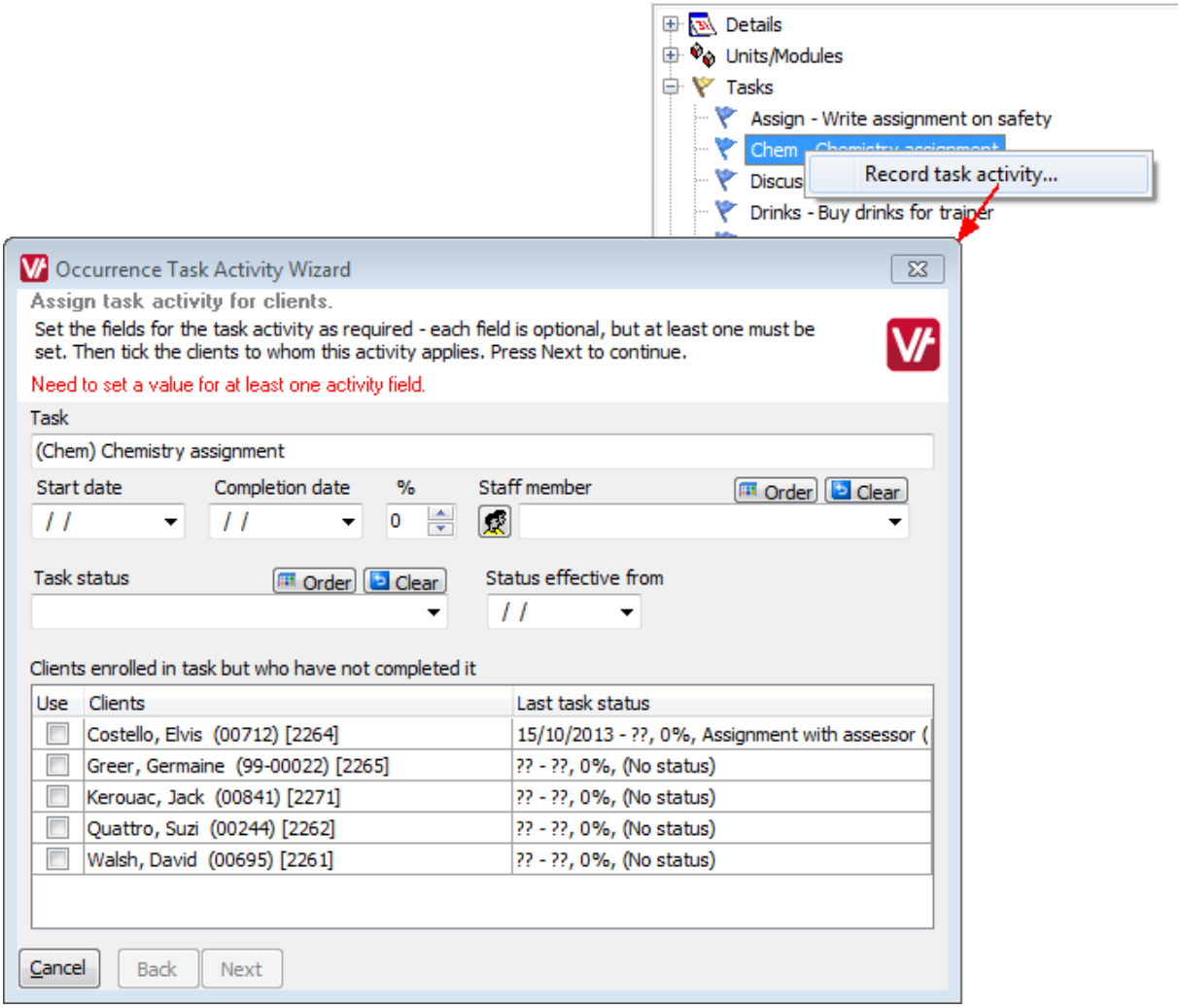
1.3.5 Recording Task Activity

You can record activity associated with a task either:

- On a per task basis (recording the same activity for several students at once)



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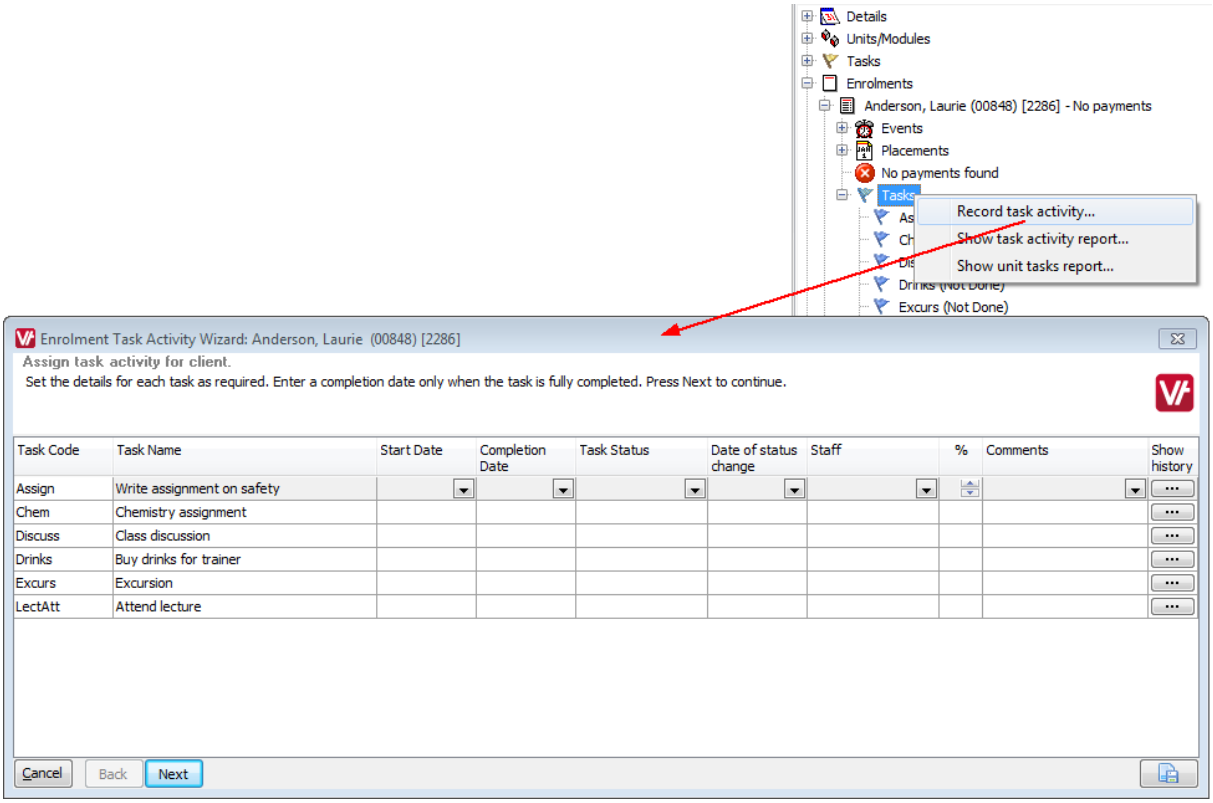
- On a per enrolment basis (recording activity on several tasks for a single person at once).



In both cases, most of the fields in the wizard are optional, giving you maximum flexibility in how you record activity.

While the eventual aim is to record when each task is completed, you can also choose to record as much or as little information as you like along the way. Examples of things you may want to do include:

- Simply recording when a task is completed 14.
- Recording when a task is started, and then later, when it is completed.
- Keeping track of a task through a number of different stages 17
- Recording only a comment for a task
- Recording only a staff member to be associated with the task

As you can record changes in the task's activity and status as often as you like, there is no limit to the number of scenarios you may want to cater for.

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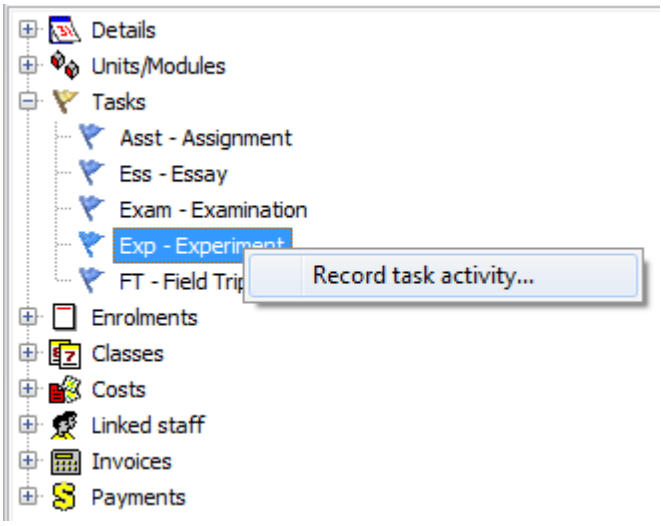
1.3.5.1 Recording Task Completion

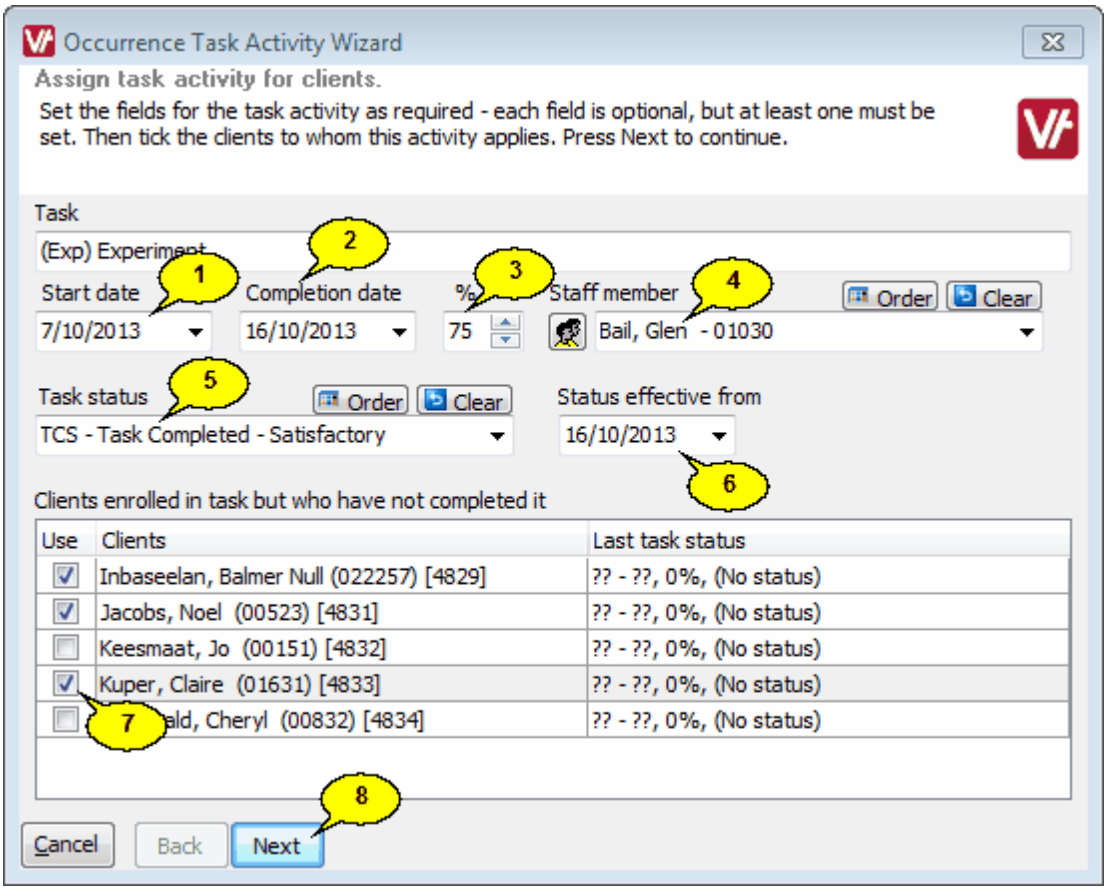
There are two ways to record task completion:

- **Per task** - select a task and record completion for multiple clients at once.
- **Per enrolment** - select an individual enrolment and record completion for multiple tasks at once.

Recording Task Completion per Task

Right-click on a task, and select ***Record task activity***.





1. Set the start date of task.
2. Set the completion date of the task.

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3. (Optional) Set the percentage mark granted for the task.
4. (Optional) Select the staff member associated with the task
5. Select the completion status for the task.
6. Set the date that this status takes effect.
7. Tick the clients who have completed the task, or tick the ***Use*** heading to tick them all at once.
8. Click ***Next*** and ***Finish*** to save.

If this task is the first or last task to be completed for any unit in a client's enrolment, then that unit will have a result assigned in line with the settings in the Task Configuration Wizard 71.

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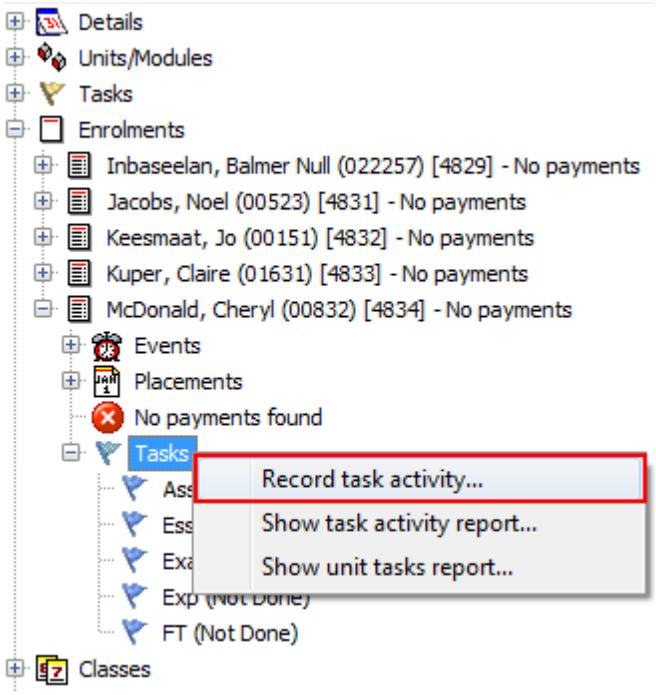
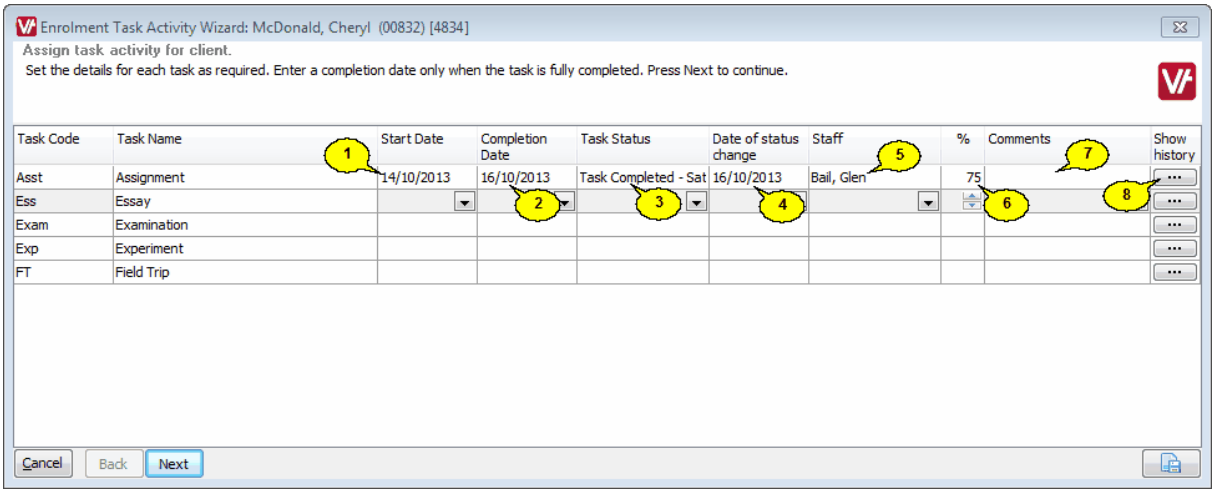
Recording Task Completion per Enrolment

Expand the enrolment, right-click on the ***Tasks*** node under the enrolment, and select ***Record task activity***.





1. Set the date the task was started.
2. Set the date the task was completed.
3. Select the completion status for the task.
4. Set the date that this status takes effect.
5. (Optional) Select the staff member associated with the task
6. (Optional) Set the percentage mark granted for the task.
7. (Optional) Enter any notes or comments regarding this task.
8. It is also possible to track the status of a task through several stages, rather than just marking it as complete. This button allows you to see a history of the task's progress. See the Tracking Task Status 17 section for more information.

If any task is the first or last task to be completed for any unit in this enrolment, then that unit will have a result assigned according to the settings in the Task Configuration Wizard 7.

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NOTES:

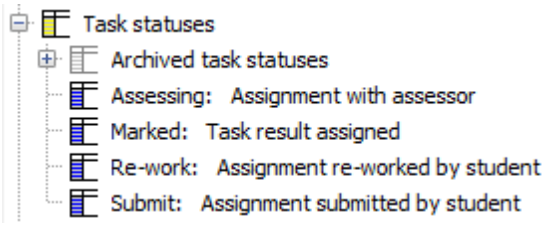
- When completing tasks in this manner, there can be several 'first completed' tasks recorded at once.
- If a unit has no existing completed task or result, and more than one of its associated tasks is completed on a single run through this wizard, the earliest recorded task completion date will be set as the unit start date.

1.3.5.2 Tracking Task Status

It is possible to track a task through several stages and see a history of the student's progress through the task, as well as seeing what stage the task is currently at. This can be particularly useful for tracking the various stages that an assignment might go through, such as:

- Submitted by student
- Sent to teacher for marking
- Returned to student for reworking
- Resubmitted by student
- Mark awarded.

To track assignments this way, you would first set up Task Statuses corresponding to each stage that the assignment might go through:



It is then possible to record a succession of different task statuses and see a record of the task's progress. For example, an assignment might go through a process like this:

- Submitted by student
- Passed on to trainer for marking
- Returned to student for reworking because it was unsatisfactory
- Resubmitted by student
- Passed on to trainer again
- Mark awarded

We start by recording the first task status, in the same way as described for Recording Task Completion 14, except that we do not record a Completion Date.

We do not record a completion date for any stage of the process until the task has been completed.

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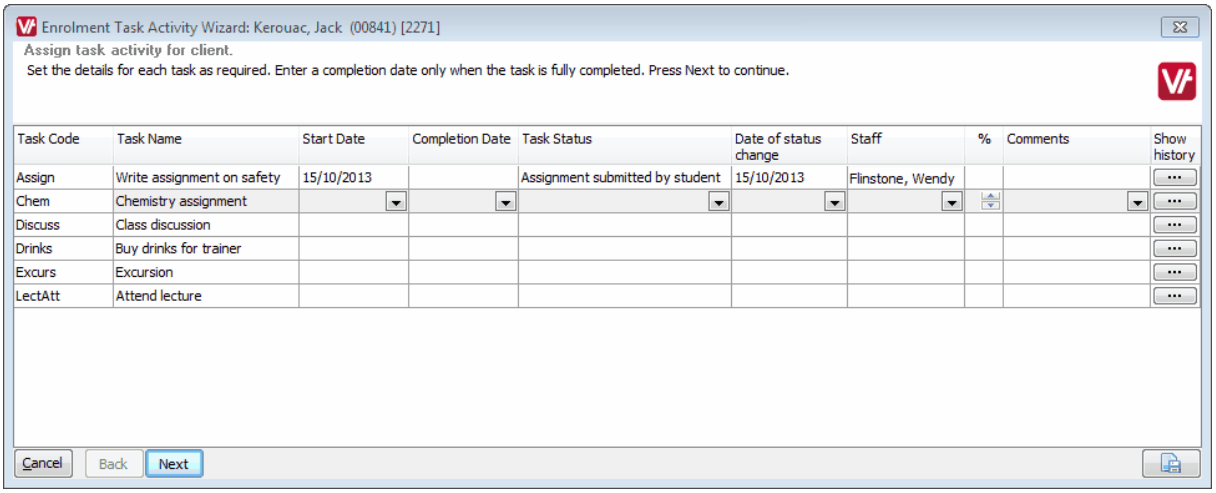
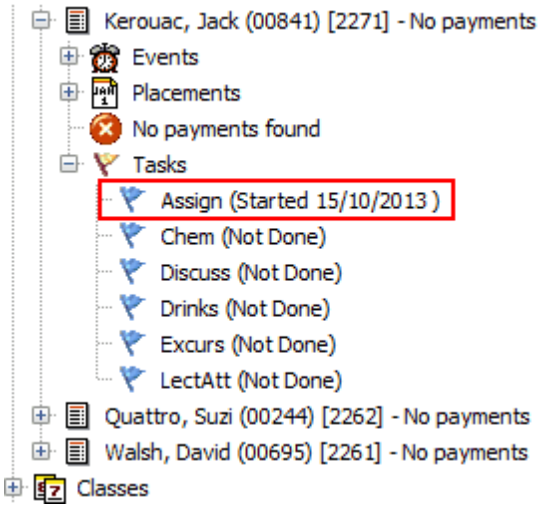
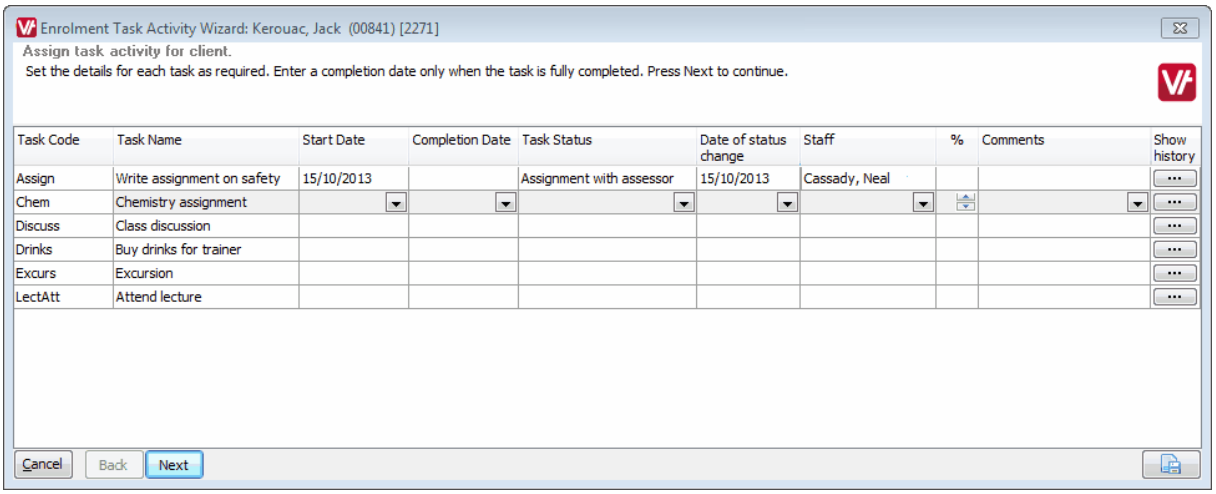


The assignment was submitted by the student on 15/10/2013 and given to Wendy Flintstone, who works at the student admin desk.

Once the first status has been recorded for the task, it will appear as "Started" in the list, followed by the specified start date.



Wendy straight away passes the assignment on to the assessor for marking, so we open the wizard again and record this as our next status:



The assignment has been passed on to the assessor, Neal Cassady, on 15/10/2013.

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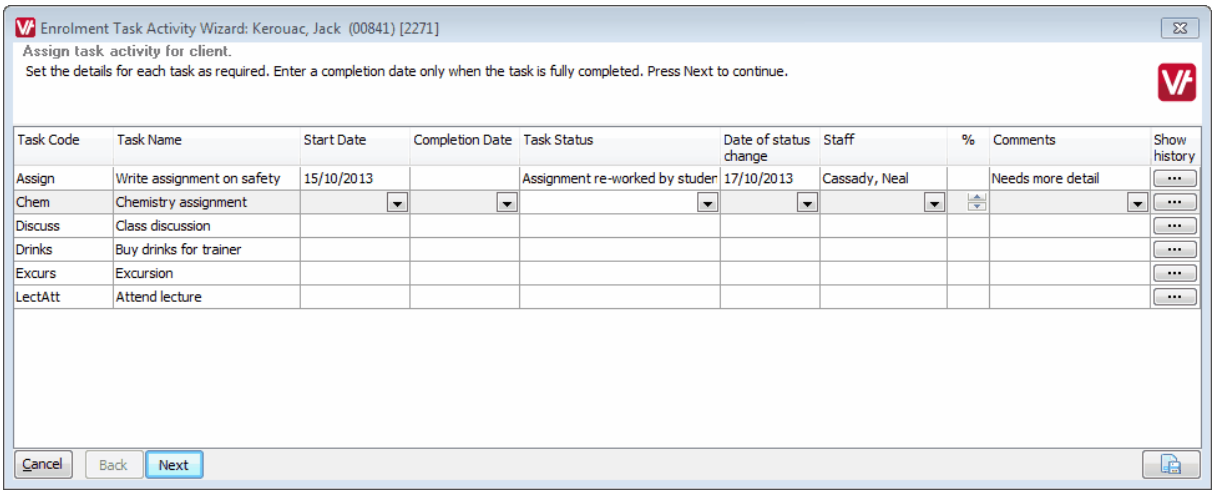
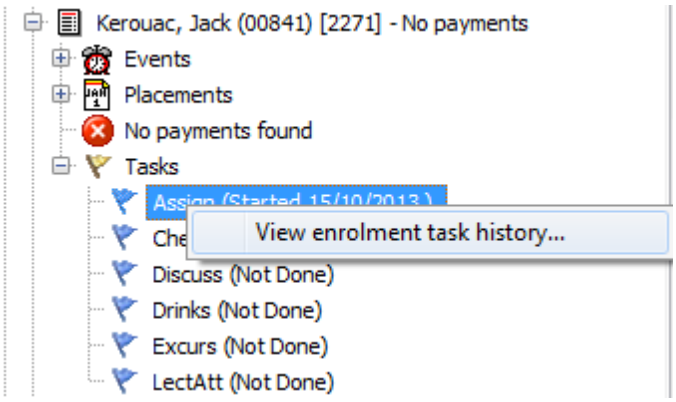
If the assignment needs to go back to the student for more work, we can record this as the next status:

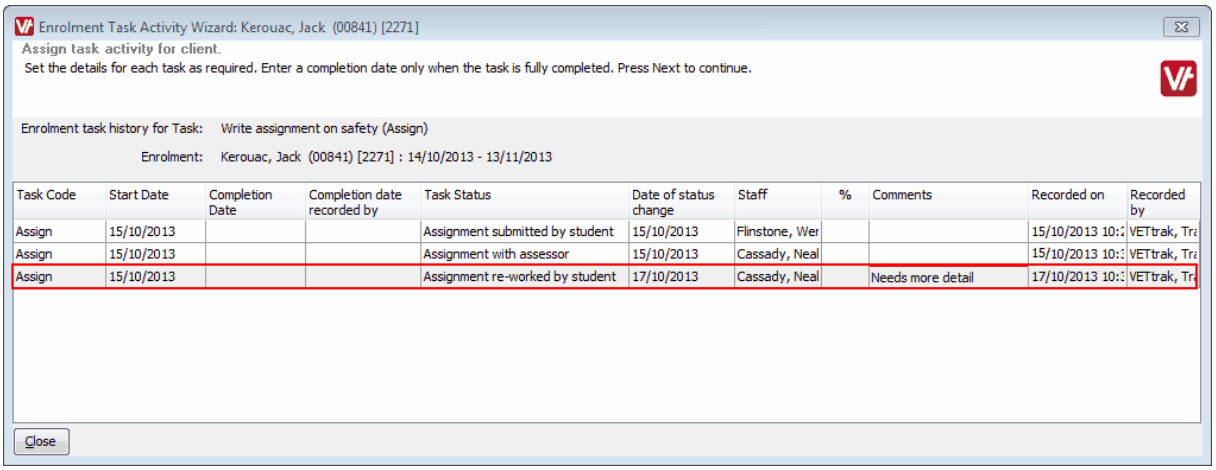


Neal Cassady has returned the assignment to the student on 17/10/2013. Note that we do not change the start date - the date the assignment is returned to the student is recorded under Date of Status Change.

At any point, we can see where the assignment is by right-clicking on the individual task and clicking ***View enrolment task history***.



We can now see where the assignment is by looking at the most recent status. In this case, the last status is "Assignment re-worked by student", so we know the assignment is currently with the student.



We then record when the assignment comes back to the assessor...

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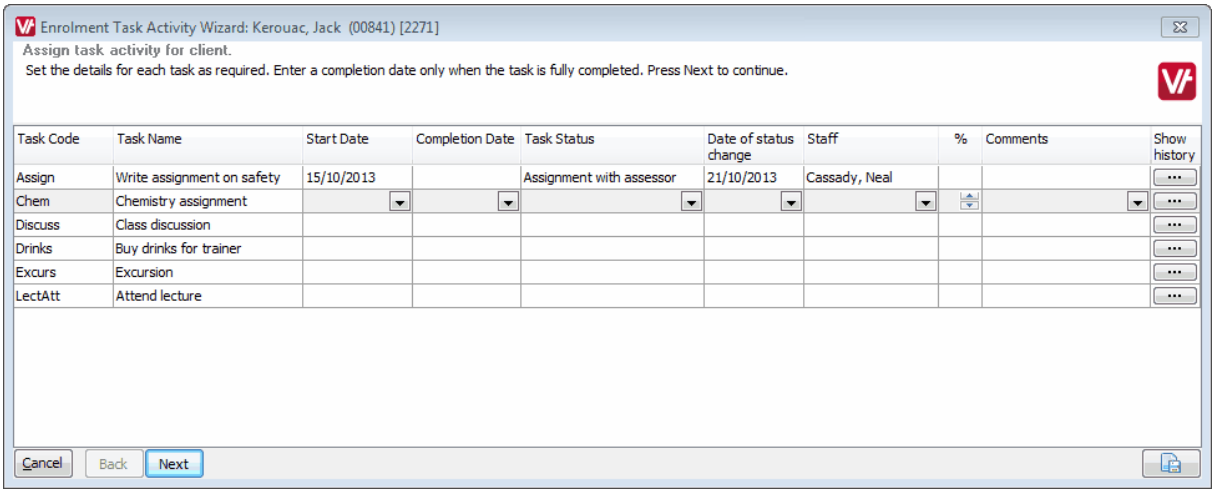

The assignment is submitted to the assessor again on 21/10/2013.

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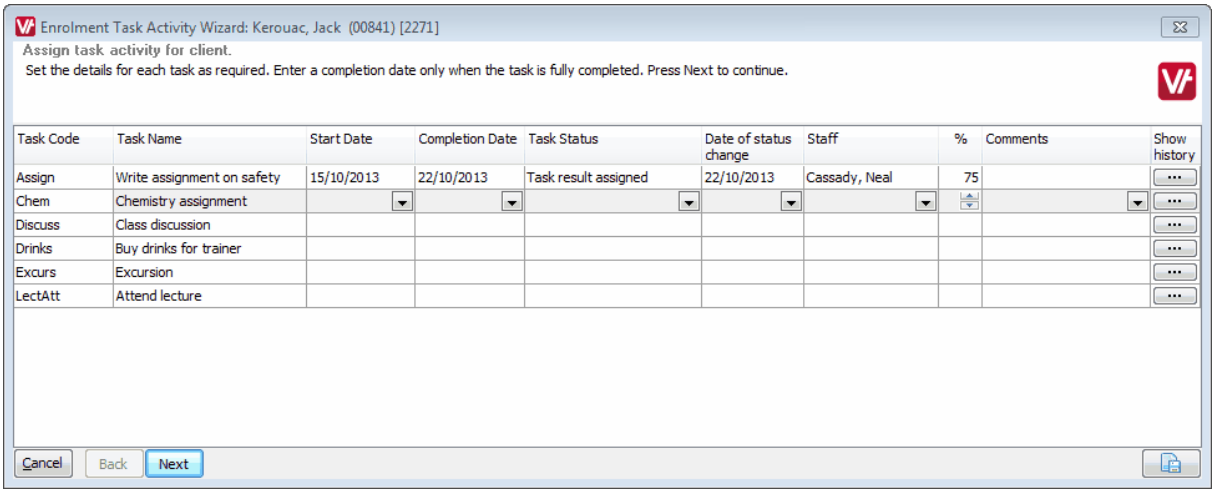
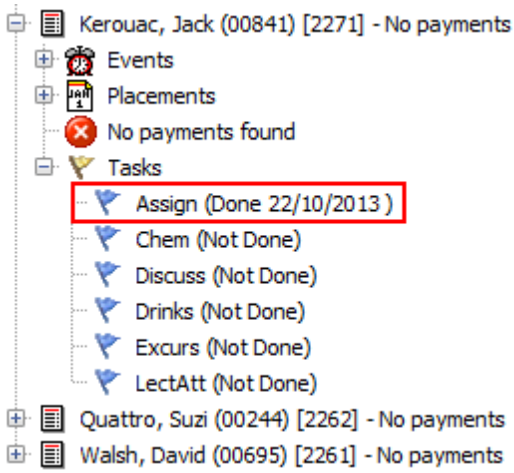
...and when a result is finally assigned. At this point we also record the completion date, and optionally, the mark assigned.



A result is finally given for the assignment on 22/10/2013. As no more needs to be done to this assignment once a result is given, we record this date as the completion date as well as the date of status change.

Once a completion date has been entered, the task will appear as done in the client's task listing:



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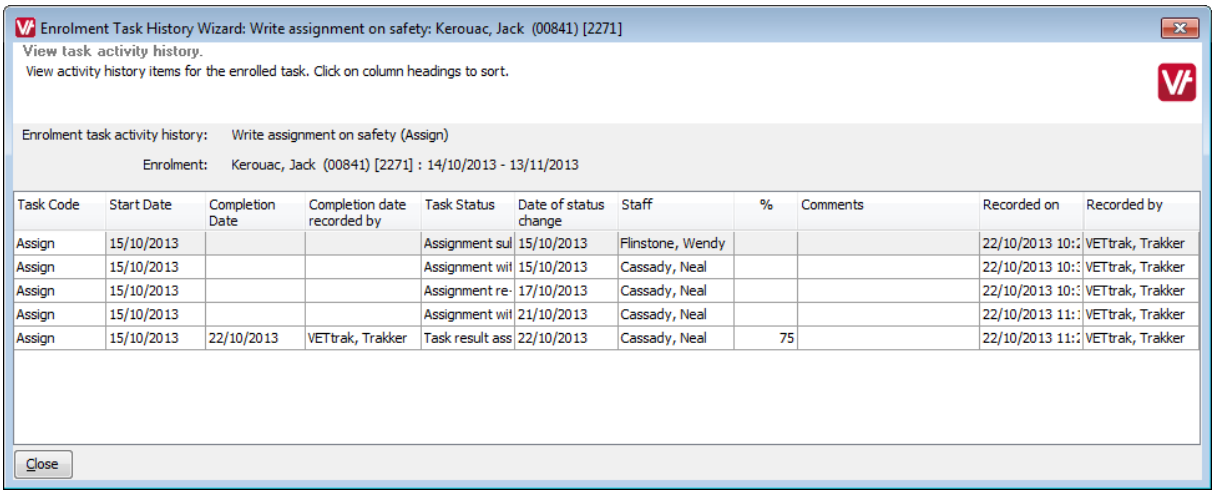
If we look again at the task history, we can clearly see all the stages the task has gone through:



1.3.6 Deleting Units

If a unit is deleted from an occurrence or occurrence enrolment, any tasks associated with the unit will NOT be removed, but will remain as 'orphaned' tasks. It is not considered appropriate to remove the tasks, as they may have already been completed, in which case removing the tasks would delete historical information about work undertaken by the enrolled client(s).

1.3.7 Linked Enrolments

Where a client is indirectly enrolled in an occurrence's units via a linked parent enrolment, any results automatically generated by task completion will be passed on to the unit in the parent enrolment.

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1.3.8 Rules for Unit Results due to Task Activity

When task activity is recorded, units are automatically resulted as follows:

When activity is recorded against the first task associated with a unit

The following will occur as long as the ***Automatically start units*** box is ticked in the Task Configuration Wizard 7, and the unit does not already have a result:

- The unit is automatically given the result specified under ***Result type when auto starting a unit*** in the Task Configuration Wizard 7.
- The start date is set according to the criteria specified in the Task Configuration Wizard.
- The finish date is set to the number of months after the task start date that is set under ***Months in future to set unit end date when automatically started***, in the Task Configuration Wizard 7.
    - If activity is recorded for more than one task for the unit, the latest activity date (whether start or completion) is used for the calculation of the finish date.
    - If the end of the enrolment is earlier than the date set here, the end date of the enrolment will be set instead.
    - However, if the latest task start date is also after the enrolment end date, then the the number of months set in the Task Configuration Wizard 7 will be used.

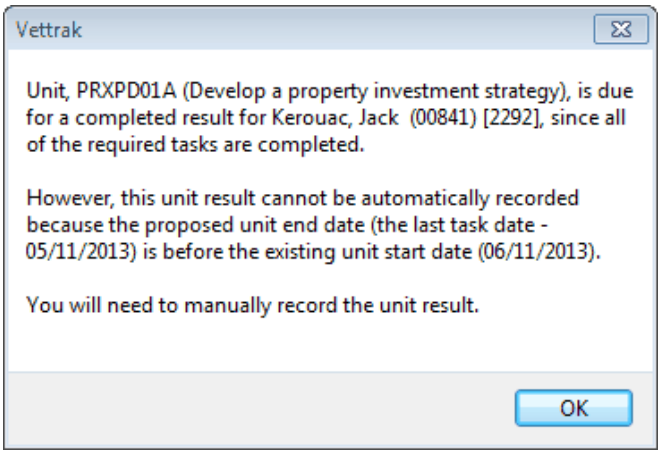
When all of the tasks associated with a unit are completed

The following will occur as long as the ***Automatically complete units*** box is ticked in the Task Configuration Wizard 7, and the unit does not already have a completed-type result.

- The unit is automatically given the result specified under ***Result type when completing a unit*** in the Task Configuration Wizard 7.
- The start date is set to the start date specified for the first task.
- The finish date is set to the date the last task was completed.

Notes Regarding Unit Dates

- The calculated unit start date will use the same preferences (from the Task Configuration Wizard) when recording either a unit started or a unit completed result.
- Unit start dates are never overwritten when auto-resulting a unit. If there is an existing start date recorded for a unit, that date is used when auto-resulting the unit.
- When auto-completing a unit, if the calculated unit end date is before an existing unit start date, the unit resulting is aborted and the message below is displayed. The user will need to manually record the unit result.



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